IMMS Implementation

Training

One of the most important elements of the IMMS implementation is end-user training. Each end-user's training is scheduled to begin no more than two weeks before IMMS "goes-live" in their Region.

All end-users will receive IMMS training. End-users have been identified as all superintendents, supervisors and lead workers, and select headquarters, district and region staff. To the extent possible, end-users will be trained in groups based on their jobs (such as region staff or superintendents), and crew type (such as electrical or landscape supervisors). Superintendents, supervisors and lead workers will be trained together during a four-day class; district and region staff will be combined for two days of training; and a group of headquarters staff received two days of training during the Pilot implementation. Your District's Implementation Teams are currently scheduling end-users for training and will notify you of the dates for your training as soon as possible.

The IMMS Team has selected several Division of Maintenance (Division) employees to conduct end-user training. These Caltrans trainers will partner with trainers from Hansen Information Technologies, the IMMS computer application expert, to ensure that the IMMS Training Team effectively teaches you how to use the IMMS computer application from the Division's perspective.

End-users will be trained on several parts of IMMS. First, they will learn about the background of the IMMS Project, including how and why it began, what IMMS is and what will happen during implementation. Next, end-users will be trained on how the IMMS computer application works. Training materials will include an explanation of how to use IMMS, real-life work scenarios that allow end-users to practice using IMMS, quick reference guides that describe how to perform common activities, descriptions of business rules and policies, and general information about how your business practices will be different with IMMS. The training materials are also specialized for 5 job types - road maintenance, electrical, landscape and special crews, and district/region staff.

So how can you get ready for IMMS Training? IMMS is similar to the Microsoft Word computer program, in that you must navigate through the system using "windows," or screens where information is entered. If you feel you can effectively create and save new documents, or open and format existing documents using computer programs like Microsoft Word, Excel and Powerpoint, you probably have sufficient "windows" knowledge. If not, learning how to use basic windows programs will make it easier to begin using IMMS. Contact your Region/District Training Coordinator today to ask how you can sign up for Windows training.

IMMS Feature of the Month

Stock Area

One of the benefits of IMMS will be accurate and up-to-date T8000 account information. The stock area in IMMS will replace the current T8000 account used to track working stock (see Table 1 for this and other key IMMS Terms). Prior to implementation, each supervisor's T8000 account information will be transferred to the IMMS stock area. In order to make sure that the information in IMMS is accurate, each supervisor

Table 1: Key Terms

MMS/MMSI	IMMS
Materials, Inventory, Working Stock	Parts Inventory/Part
T8000 Reconciliation	Adjustment Transaction
T8000 Account	Stock Area
Part Catalog	Part Catalog
FA83 Column Entry	Issue Transaction

will take an inventory of his/her working stock after the T8000 information is input into IMMS. From there, supervisors will make additions/deletions to reflect their actual inventory levels on hand, if needed. As a result, the part inventory (formerly called working stock) will be accurate and up-to-date when supervisors begin using IMMS.

Unlike the current information available in the T8000 account that is often inaccurate and outdated, the part inventory in IMMS will always reflect the most recent additions to or deletions from the IMMS stock area. Supervisors will be able to view and report the current quantity on hand of all parts in their stock area, or correct the balance in IMMS at any time. When supervisors record the use of parts from work performed, the stock area will automatically be updated with the

Figure 1: Visual Resource Manager Stock Area

In the screen shot above, the supervisor can see that she has 2 boxes of 3/16"X3/4" Aluminum Blind Rivets on hand and available for use, and none have been "reserved" for specific jobs.
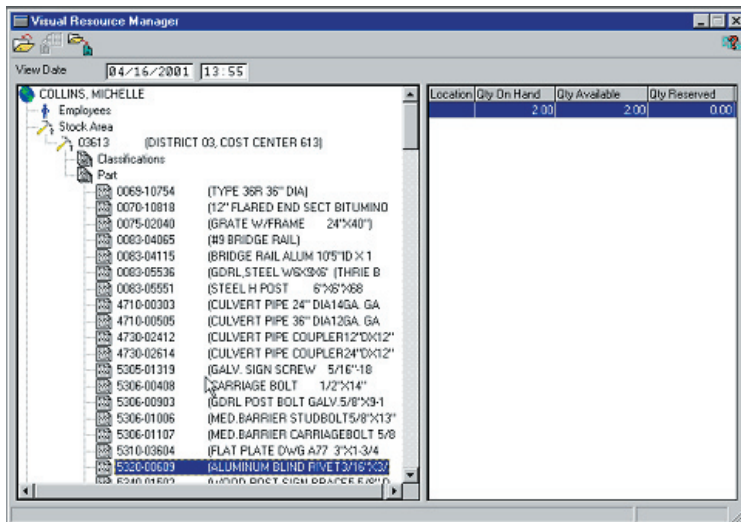
correct information. Figure 1 shows how a supervisor might use the Visual Resource Manager in IMMS to view the current quantity of parts on hand.

Currently, when a brand new material must be added to the working stock in MMSI, purchasing and region office staff must update the information in Service & Supplies (SVS); supervisors must then wait for an updated SVS T8000 report to reflect the new materials. By the time supervisors receive the T8000 report, it is often outdated and does not reflect recent additions or materials usage.

In IMMS, when a new part must be added to the part inventory, the IMMS Coordinator will work with SVS to update the IMMS part catalog (see Table 1 for key terms) with the new part number, usually within two working days. The supervisor will then add the part directly into his/her stock area, and can immediately record its use on a work order or view the quantity on hand.

With IMMS, several steps will be taken to ensure that the stock area is kept accurate and up to date. First, supervisors will run monthly reports of frequently used items, such as guide markers and "big ticket" items, such as guardrail. They will check the levels shown in IMMS against actual levels and make any necessary adjustments. Supervisors will also take an inventory of their entire stock area every six months. Superintendents will have the ability to run summary reports of adjustment transactions performed (previously called T8000 reconciliation, see Table 1), and district landscape specialists will review chemical adjustments on a regular basis.

Contributors

Larry Orcutt, Maintenance Division Chief
Agustin Rosales, IMMS Project Manager
Kari Gutierrez, IMMS Information Technology Manager
IMMS Steering Committee